

# Batching – Creating, Reviewing/Rejecting Claim Items from a Batch, Billing

## Creating a Batch

When the generator is turned on, Encounters with an Active Authorization and a status of Released will be automatically batched.

1. **Getting here:** Login, select the Facility, click Agency, Billing, and click Claim Item List on the navigation pane.

2. The Item Status will default to Released. Click Create Batches.

**NOTE:** to search by a date range, use a colon between the date (1/1/2013:1/31/2013), to search for encounters prior to a date use < (<1/1/2013), to search for encounters after a date use > (>7/1/2013).

The screenshot shows the Idaho WITS Training system interface. The navigation pane on the left has a red circle with the number 1 pointing to the 'Billing' menu item, which is expanded to show 'Claim Item List'. The main content area shows the 'Claim Item Search' form with various search criteria. A red circle with the number 2 points to the 'Create Batches' button. A red box highlights a note: 'To view Released Encounter for PSC Clients (as of 10/1/2013), change to Fee for Service Equivalent.' Below the search form is a table titled 'Claim Item List (Export)' with columns: Item #, Client Name, FFS Type, Add-On Level, Service Date, Service, Duration, Status, Release Date, Charge, and Actions. The table contains 10 rows of data.

Item #	Client Name	FFS Type	Add-On Level	Service Date	Service	Duration	Status	Release Date	Charge	Actions
387	Abby, Abigail	FFS	None	3/12/2013	H0004/HF	60 Min	Released	3/12/2013	\$45.00	<a href="#">Profile</a>
388	Abby, Abigail	FFS	None	3/11/2013	H0001/HF/HF	240 Min	Released	3/14/2013	\$180.00	<a href="#">Profile</a>
389	Abby, Abigail	FFS	None	3/15/2013	H0004/HF	60 Min	Released	3/15/2013	\$45.00	<a href="#">Profile</a>
391	Abby, Abigail	FFS	None	3/18/2013	H0001/HF/HF	60 Min	Released	3/18/2013	\$45.00	<a href="#">Profile</a>
924	Adams, John	FFS	None	7/10/2013	H0001/HF/HF	120 Min	Released	8/21/2013	\$90.00	<a href="#">Profile</a>
925	Adams, John	FFS	None	7/10/2013	H0003/HF	90 Min	Released	8/21/2013	\$13.50	<a href="#">Profile</a>
273	Alb, Ruth	FFS	None	10/12/2012	H0005	60 Min	Released	10/12/2012	\$22.52	<a href="#">Profile</a>
274	Alb, Ruth	FFS	None	10/12/2012	H0005	120 Min	Released	10/12/2012	\$45.04	<a href="#">Profile</a>
278	Anderson, Ace	FFS	None	11/2/2012	H0004/HF	60 Min	Released	11/2/2012	\$47.24	<a href="#">Profile</a>
279	Anderson, Delilah	FFS	None	11/8/2012	H0004/HF	60 Min	Released	11/8/2012	\$47.24	<a href="#">Profile</a>

3. Select the **Available Plans** and click the Top Arrow to move the selected plan(s) to the Selected Plans box.
4. Click **Go**.
5. The claim items for the selected plans are being batched. Click **Claim Batch List** on the navigation pane.

**Choose Plan(s) for Batching**

Available Plans	Selected Plans
IDOC Funding	State General

Cancel Clear Go

Diagram illustrating the plan selection process:

- Red arrow 3 points from the "State General" plan in the "Selected Plans" box to the "Go" button.
- Red arrow 4 points from the "Go" button to the "Go" button.

**Idaho-WITS Training**

User: Person, Staff, CADIC  
Loc: D Williams Agency, Williams Treatment  
Client:

Printable View

July 2013 Logout

**Claim Item Search**

The claim items for the selected 1 plan(s) are being batched. This may take a few minutes to complete.

Plan: [Dropdown] Group Enrollment: [Dropdown] ENC ID: [Text]

Client First Name: [Text] Client Last Name: [Text] Charge: [Text]

Subscriber/Resp Party First Name: [Text] S/R Party Last Name: [Text] Service: [Text]

Subscriber/Resp Party Account #: [Text] Rendering Staff: [Text] Service Date: [Text]

Authorization #: [Text]

Item Status: Released [Dropdown] Facility: [Dropdown]

FFS Type: Fee for Service [Dropdown]

Add-On Level: [Dropdown]

Navigation Pane:

- Home Page
- Agency List
- Tx Team Groups
- Billing
- Claim Item Search
- Claim Batch List**
- Encounter List
- EOB Transaction List
- Payment List
- Billing Transaction List

## Reviewing/Rejecting Claim Items from a Batch

6. On the Claim Batch List, select the Status of **Released** and click **Go**.
7. Click **Claim Items** to review the individual claim items in the batch.

**Provider Claim Batch List**

Plan Name  Created Date   
 Billing Form  Transmit Date   
 Batch #  Status  Awaiting Review  
 FFS Type Fee for Service

[Clear](#) [Go](#)

The Status will default to Awaiting Review. Change to Released and click Go.

**6**

**Claim Batch List (Export)** [Download 837](#)

Batch #	Status	Batch For	FFS Type	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions

**Claim Item List (Export)**

Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge	Actions

**Provider Claim Batch List**

Plan Name  Created Date   
 Billing Form  Transmit Date   
 Batch #  Status  Released  
 FFS Type Fee for Service

[Clear](#) [Go](#)

**Claim Batch List (Export)** [Download 837](#)

Batch #	Status	Batch For	FFS Type	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions
104	Released	IDOC-Provider Training Agency	FFS	WITS Batch	P	\$79.65		8/30/2013		<a href="#">Claim Items</a>   <a href="#">Profile</a>

**7**

**Claim Item List (Export)**

Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge	Actions

8. Click **Profile** to review the individual Encounter note.

**NOTE: only billing information can be viewed.**

9. Click **Finish**.

**Provider Claim Batch List**

Plan Name  Created Date   
Billing Form  Transmit Date   
Batch #  Status Released  
FFS Type Fee for Service

**Claim Batch List (Export)** [Download 837](#)

Batch #	Status	Batch For	FFS Type	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions
104	Released	DOC-Provider Training Agency	FFS	WTS Batch	P	\$79.65		8/30/2013		<a href="#">Claim Items</a>   <a href="#">Profile</a>

**Claim Item List for Batch 104 (Export)** [Remove From Claim Batch](#)

Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge	Actions
<input type="checkbox"/>	404	879	Cherry, AA	H0005	Batched	1284		\$37.26 <a href="#">Profile</a>
<input type="checkbox"/>	405	1153	Banana, C	H0004	Batched	1139		\$28.89 <a href="#">Profile</a>
<input type="checkbox"/>	406	1041	Banana, T	H0003	Batched	1186		\$13.50 <a href="#">Profile</a>

**Profile for Claim Item #879 for Cherry, AA**

ENC ID: 1993 Delivered Service: H0005/HZ/HF FFS Type Fee for Service  
Program: Adult OPop Service Start: 8/19/2013 10:00 AM  
Diagnoses: 305.00 / / Service End: 8/19/2013 11:30 AM  
Pregnant: # Sessions/Units: 1 Duration: 90 Min  
Status: Batched Rendering Staff: Doors, Ophem

**Service Fee**

Billing Units 6.00 X Rate / Unit \$6.21 = \$37.26 Cost Center  
Billing Note  
Group Enrollment IDOC Group (IDOC Funding, 4) Encounter Post Date 8/19/2013  
Tier Type Fee for Service Created Date 8/19/2013 12:22 PM

Service Category  
Payor Billing Service OP and IOP (Group): H0005/HZ/HF  
Category Outpatient  
Service Location Office  
Unit Desc 1 unit = 15 Min  
Authorization 1284-90847 Available 268.14  
Available to pay this claim item: 268.1400

**Administrative Actions**

Claim # 404 Claim Batch # 104 Claim Batch Created Date 8/30/2013 5:11 PM

10. Check the **box** next to the Claim Item to be removed from the Batch.

**NOTE: claims rejected from a batch will have the status of Awaiting Review. Claims with this status must be individually reviewed and the status must be changed to Released before they can be batched at a later date.**

11. Click **Remove From Claim Batch**. The Claim Item is removed from the Batch

Provider Claim Batch List

Plan Name

Billing Form

Batch #

FFS Type

Created Date

Transmit Date

Status

Released

Fee for Service

Clear

Go

Claim Batch List (Export)

Download 837

Batch #		Status	Batch For	FFS Type	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions
104		Released	IDOC-Provider Training Agency	FFS	WITS Batch	P	\$79.65		8/30/2013		<a href="#">Claim Items</a>   <a href="#">Profile</a>

10

11

Claim Item List for Batch 104 (Export)

Remove From Claim Batch

	Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge	Actions
<input checked="" type="checkbox"/>	404	879	Cherry, AA	H0005	Batched	1284		\$37.26	<a href="#">Profile</a>
<input type="checkbox"/>	405	1153	Banana, C	H0004	Batched	1139		\$28.89	<a href="#">Profile</a>
<input type="checkbox"/>	406	1041	Banana, T	H0003	Batched	1186		\$13.50	<a href="#">Profile</a>

Provider Claim Batch List

Plan Name

Billing Form

Batch #

FFS Type

Created Date

Transmit Date

Status

Released

Fee for Service

Clear

Go

Claim Batch List (Export)

Download 837

Batch #		Status	Batch For	FFS Type	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions
104		Released	IDOC-Provider Training Agency	FFS	WITS Batch	P	\$42.39		8/30/2013		<a href="#">Claim Items</a>   <a href="#">Profile</a>

The claim item is removed from the batch.

Claim Item List for Batch 104 (Export)

Remove From Claim Batch

	Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge	Actions
<input type="checkbox"/>	405	1153	Banana, C	H0004	Batched	1139		\$28.89	<a href="#">Profile</a>
<input type="checkbox"/>	406	1041	Banana, T	H0003	Batched	1186		\$13.50	<a href="#">Profile</a>

# Billing Claim Batches

12. Click Profile.

13. Click Bill It under Administrative Actions.

Provider Claim Batch List

Plan Name

Billing Form

Batch #

FFS Type

Fee for Service

Created Date

Transmit Date

Status

Released

Clear

Go

Claim Batch List (Export)

Download 837

Batch #	Status	Batch For	FFS Type	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions
104	Released	IDOC-Provider Training Agency	FFS	WITS Batch	P	\$42.39		8/30/2013		<a href="#">Claim Items</a> <a href="#">Profile</a>

Claim Item List for Batch 104 (Export)

Remove From Claim Batch

Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge	Actions
405	1153	Banana, C	H0004	Batched	1139		\$28.89	<a href="#">Profile</a>
406	1041	Banana, T	H0003	Batched	1186		\$13.50	<a href="#">Profile</a>

Provider Claim Batch Profile

Batch # 104

Batch For IDOC-Provider Training Agency

Created By Buskey, Michelle

Updated By Buskey, Michelle

Billing Form WITS Batch

Order Primary

Service Month/Year

Charge Amount \$42.39

Status Released

Created Date 8/30/2013 5:11 PM

Updated Date 8/30/2013 5:11 PM

Transmit Date

Ignore Warnings No

FFS Type Fee for Service

Errors List (Export)

Batch #	Level	Message	Created	Claim #	Item #
---------	-------	---------	---------	---------	--------

Administrative Actions

[Awaiting Review](#) [Hold](#) [Void](#) [Bill It](#)

Cancel

Save

Finish

14. The status of the Batch is Billed. Click **Finish**.

Provider Claim Batch Profile

Batch #104

Batch ForDOC-Provider Training Agency

Created ByBuskey, Michelle

Updated ByBuskey, Michelle

Billing FormWITS Batch

OrderPrimary

Service Month/Year

Charge Amount\$42.39

StatusBilled

Created Date8/30/2013 5:11 PM

Updated Date8/30/2013 6:19 PM

Transmit Date8/30/2013 6:19 PM

Ignore WarningsNo

FFS TypeFee for Service

Errors List

Export

Batch #	Level	Message	Created	Claim #	Item #

Administrative Actions

Finish